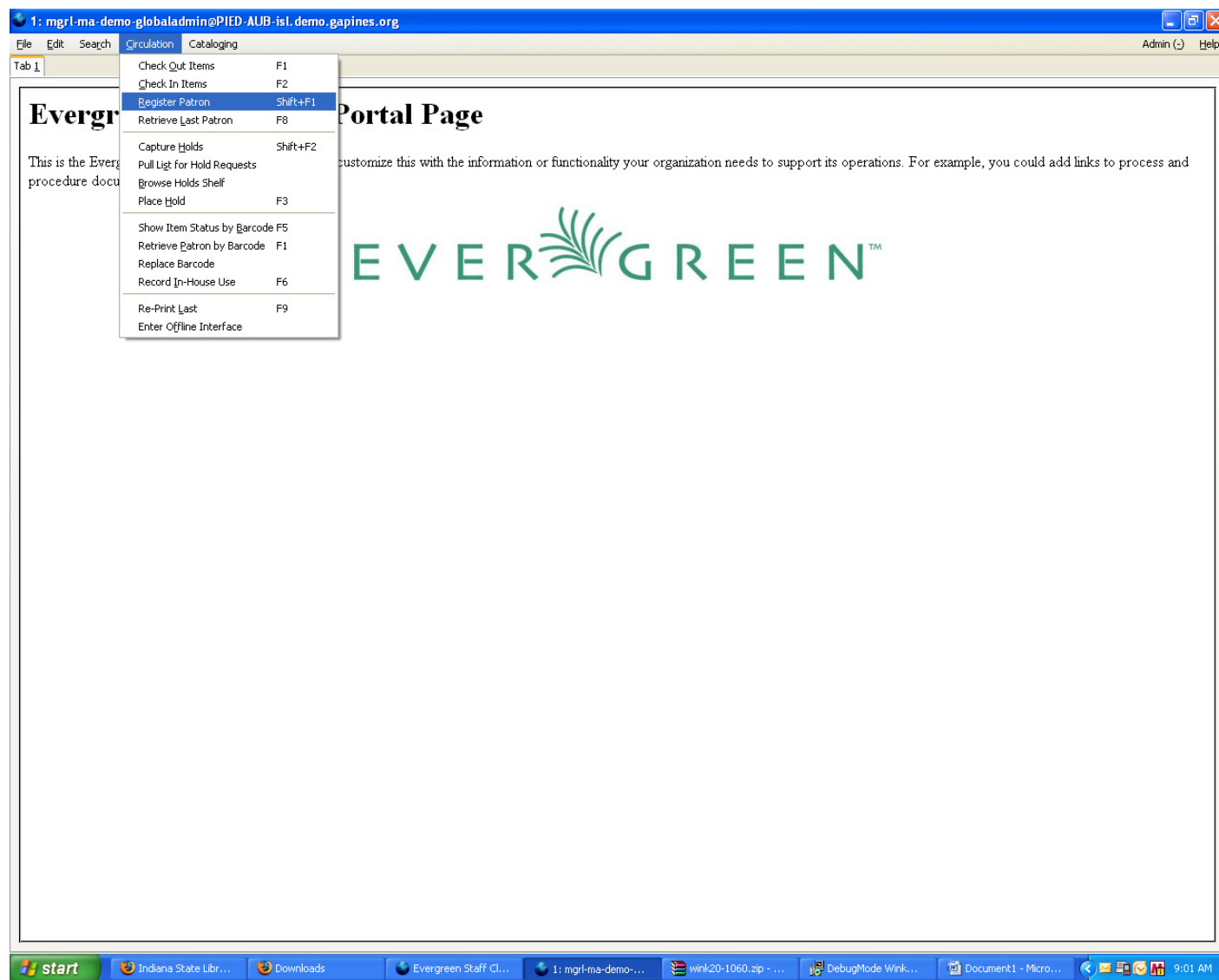




## Staff Tutorials

### Registering Patrons

To register a new patron, we will begin by accessing the “Circulation” menu and selecting “Register Patron”



## User Identification

The first step to registering a patron is to scan or enter the barcode from the library card you are assigning the new patron. This can be done manually or using a barcode scanner.

The screenshot shows a web browser window with the address bar displaying `1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org`. The browser's menu bar includes File, Edit, Search, Circulation, Cataloging, Admin, and Help. The page title is "1 Register Patron".

The main content area is titled "Evergreen User Editor" and includes a "Welcome mgrl-ma-demo-globaladmin" message. A "Print Page" button is in the top right. A note states: "Note: required or invalid fields are marked with color". A red link "View Errors" is also present.

On the left is a sidebar with navigation links: "1. User Identification" (highlighted), "2. Contact Info", "3. Addresses", "4. Groups and Permissions", "5. Statistical Categories", "6. Surveys", and "7. Finish".

The main form contains the following fields:

- Barcode: [Redacted]
- Username: [Redacted]
- Password: [Masked] Password: 5070
- Verify Password: [Masked]
- First Name: [Redacted]
- Middle Name: [Empty]
- Last Name: [Redacted]
- Suffix: [Empty] - Pick - [Dropdown]
- Date of Birth: [Empty] (YYYY-MM-DD)
- Primary Identification Type: [- Required -] [Dropdown]
- Primary Identification: [Empty]

A "Forward>>" link is located at the bottom right of the form area.

The Windows taskbar at the bottom shows the Start button and several open applications: Indiana State Lib..., Downloads, Evergreen Staff Cl..., 1: mgrl-ma-demo..., wink20-1060.zip - ..., DebugMode Wink..., and Document1 - Micro... The system clock shows 9:01 AM.

After entering the barcode, the "Username" field will automatically populate with the barcode. This can be changed by the circulation staff, if the patron has a username they would like to use, or it can remain the barcode.

Also be sure to give the patron the 4-digit "Password" to the right of the password box. This will be their temporary password to access the "My Account" section of the Online Catalog.

Staff should continue populating the Name, Birth date and Identification fields.

After completing all of the required fields, click “Forward>>”

1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

1 Register Patron

Print Page

Welcome mgrl-ma-demo-globaladmin

### Evergreen User Editor

Note: required or invalid fields are marked with color [View Errors](#)

[1. User Identification](#)  
[2. Contact Info](#)  
[3. Addresses](#)  
[4. Groups and Permissions](#)  
[5. Statistical Categories](#)  
[6. Surveys](#)  
[7. Finish](#)

Barcode	21324546484684	
Username	21324546484684	
Password	<input type="password"/>	Password: 5070
Verify Password	<input type="password"/>	
First Name	Evergreen	
Middle Name	Indiana	
Last Name	Testuser	
Suffix	Mr	- Pick -
Date of Birth	1965-02-12	(YYYY-MM-DD)
Primary Identification Type	Drivers License	
Primary Identification	IN-546155468	(GA-123456789)

[Forward>>](#)

## Contact Info

The following screen will collect the patron's contact information

The screenshot shows a web browser window with the address bar displaying "1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org". The browser's menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", "Admin (-)", and "Help". The page title is "1 Register Patron". The main content area is titled "Evergreen User Editor" and includes a "Welcome mgrl-ma-demo-globaladmin" message and a "Print Page" button. A note states: "Note: required or invalid fields are marked with color". A red link "View Errors" is visible. The form is divided into a left sidebar with navigation links and a main content area with input fields.

**Navigation Links (Left Sidebar):**

- 1. User Identification
- 2. Contact Info (highlighted)
- 3. Addresses
- 4. Groups and Permissions
- 5. Statistical Categories
- 6. Surveys
- 7. Finish

**Form Fields (Main Content Area):**

Email Address	<input type="text"/>
Daytime Phone	<input type="text"/> Example: 123-456-7890 or 123-456-7890 ex123
Evening Phone	<input type="text"/>
Other/Cell Phone	<input type="text"/>
Home Library	<input type="text" value="Auburn Public Library"/>

At the bottom of the form, there are two links: "<<Back" and "Forward>>".

Enter the patrons email (required for pre-overdue notices and hold messages) and any available phone numbers. The home library will default to the library where the patron is registering.

After completing all of the fields, click "Forward>>" to continue on to the patron's address information.

## Addresses

1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org

File Edit Search Circulation Cataloging Admin (-) Help

1 Register Patron

Print Page

Welcome mgrl-ma-demo-globaladmin

### Evergreen User Editor

Note: required or invalid fields are marked with color [View Errors](#)

[1. User Identification](#)  
[2. Contact Info](#)  
[3. Addresses](#)  
[4. Groups and Permissions](#)  
[5. Statistical Categories](#)  
[6. Surveys](#)  
[7. Finish](#)

Address		Within City Limits	Valid	Mailing Address	Physical Address
Label	Zip				
Street 1					
Street 2					
City	County	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State	Country USA				
Delete this Address					

Create a New Address

<<Back Forward>>

From the “Addresses” screen enter the patrons address. If they have multiple addresses they would like to be contacted at, you can click “Create a New Address” to add alternate addresses.

After completing, click “Forward>>” to continue on to the Groups and Permissions editor.

## Groups and Permissions

From the Groups and Positions interface circulation staff can choose the Profile Group for this account. Profiles include Patron (Friend, Non Resident, Reciprocal Borrower, etc.) or Staff (Circ1, Circ2, Admin, etc.) Permissions for each of these groups will be decided by the Evergreen Indiana consortium. **It is also important to note that only supervisors designated by Evergreen Indiana will be able to create and edit staff Profiles.**

From Groups and Permissions you can also choose to apply filtering to Internet Access, and place “Alert Messages” which can only be seen by other staff.

If this user is an adult who wishes to be the “lead” account, you can set the “Family/Group Lead” account flag on this account.

After completing the required fields click “Forward>>”

## Statistical Categories

Statistical Categories will be decided on a library-by-library basis.

Circ staff can chose what StatCat’s to place patrons into based on guidelines laid out by their particular library.

After completing the required fields click “Forward>>”

The screenshot shows a web browser window with the address bar displaying "1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org". The browser's menu bar includes "File", "Edit", "Search", "Circulation", "Cataloging", "Admin (-)", and "Help". The page title is "1 Register Patron".

The main content area is titled "Evergreen User Editor" and includes a "Print Page" button in the top right corner. A welcome message "Welcome mgrl-ma-demo-globaladmin" is displayed. A note states: "Note: required or invalid fields are marked with color". A red link "View Errors" is located in the top right of the form area.

On the left side, there is a vertical navigation menu with the following links: "1. User Identification", "2. Contact Info", "3. Addresses", "4. Groups and Permissions", "5. Statistical Categories" (highlighted in green), "6. Surveys", and "7. Finish".

The main form area contains a table with the following structure:

Stat Cat Name	Owner	Value
Comics	PINES	<input type="text" value="- None Selected -"/> or <input type="text"/>
Resident	PINES	<input type="text" value="- None Selected -"/> or <input type="text"/>

At the bottom of the form, there are two links: "<<Back" and "Forward>>".

## Surveys

Surveys can be set on a Consortium wide basis, or on a library by library basis.

From this screen, Circ Staff can record patron's answers to any surveys in progress at that time.

The screenshot shows a web browser window with the address bar displaying "1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org". The browser's menu bar includes "File", "Edit", "Search", "Circulation", and "Cataloging". The page title is "1 Register Patron". The main content area is titled "Evergreen User Editor" and includes a "Welcome mgrl-ma-demo-globaladmin" message and a "Print Page" button. A note states: "Note: required or invalid fields are marked with color". A red link "View Errors" is visible. On the left, a vertical menu lists steps: "1. User Identification", "2. Contact Info", "3. Addresses", "4. Groups and Permissions", "5. Statistical Categories", "6. Surveys" (highlighted in green), and "7. Finish". The main form area is titled "Voter Registration" and contains two questions: "Are you registered to vote?" with a "Yes" dropdown, and "Would you like to register today?" with a "No" dropdown. At the bottom, there are "<<Back" and "Forward>>" navigation links.

After completing the required fields click "Forward>>"



## Finishing

The last step to registering a patron is “Finish”

The screenshot shows a web browser window with the address bar displaying '1: mgrl-ma-demo-globaladmin@PIED-AUB-isl.demo.gapines.org'. The browser's menu bar includes 'File', 'Edit', 'Search', 'Circulation', 'Cataloging', 'Admin (-)', and 'Help'. The page title is '1 Register Patron'. The main content area is titled 'Evergreen User Editor' and includes a 'Print Page' button in the top right corner. A welcome message 'Welcome mgrl-ma-demo-globaladmin' is displayed. A note states: 'Note: required or invalid fields are marked with color'. A red link 'View Errors' is present. On the left, a vertical menu lists seven steps: '1. User Identification', '2. Contact Info', '3. Addresses', '4. Groups and Permissions', '5. Statistical Categories', '6. Surveys', and '7. Finish'. The '7. Finish' step is highlighted with a green background. The main area contains a green box with the text: 'You are now ready to save the user to the database. To view or print a summary of the changes, click on the "View Summary" link. To save the user, click on the "Save User" button.' Below this text are three buttons: 'View Summary', 'Save User', 'Save and Clone User', and 'Cancel'. At the bottom left of the main area is a '<<Back' link.

Staff can view and/or print a summary of the patron’s registration, or they can chose to Save, Clone or Cancel the registration.

Typically, “Save User” will be the choice. One circumstance where you might “clone” a user is if a mother and daughter come in to receive a library card. You can create the mother’s account and “clone” her account to automatically populate fields like addresses and phone numbers to save time. Cloning also “groups” all clones of that particular user as “children”belonging to the lead account.

After clicking “Save User” you will see the following message, signifying that the user has been created successfully.

